



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Age: 30		<p><b>HOWARD UNDERWOOD, ROBERTA UNDERWOOD and BETH UNDERWOOD WILKINSON</b>, parents and sister, current Limited Co-Conservators of the Person with medical consent powers are Petitioners and request appointment of <b>COLIN WILKINSON</b>, brother-in-law, as an additional Limited Co-Conservator of the Person with medical consent powers and the same limited powers as the current co-conservators have.</p> <p>Petitioners were previously granted medical consent powers.</p> <p>Voting rights affected.</p> <p><b>Petitioners state</b> that the conservatee suffers from physical and developmental disabilities and a seizure disorder. He is unable to provide for his own needs and requires assistance from his conservators and is a client of CVRC.</p> <p><b>Court Investigator Charlotte Bien filed a report on 11/05/14.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Court Investigator advised rights on 11/05/14.</b></p> <p><b>Voting rights affected, need minute order.</b></p>	
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				Reviewed by: JF
				Reviewed on: 11/13/14
				Updates:
		Recommendation:		
		File 1 - Underwood		

(1) First and Final Account and Report of Executor and Petition for its Settlement,  
 (2) for Allowance of Statutory Commissions and (3) Final Distribution

<b>DOD: 03/09/2005</b>		<b>KAREN E. PHILLIPS-WILKES</b> , Executor, is petitioner.  Account Period: 03/09/2005 – 05/12/2014  <table> <tr> <td>Accounting</td> <td>-</td> <td><b>\$135,500.00</b></td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td><b>\$135,500.00</b></td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td><b>\$135,000.00</b></td> </tr> </table> Executor – Waives  Attorney – Waives  <b>Distribution, pursuant to decedent's Will, is to:</b>  <b>Karen E. Phillips-Wilkes – 100% in real property</b>	Accounting	-	<b>\$135,500.00</b>	Beginning POH	-	<b>\$135,500.00</b>	Ending POH	-	<b>\$135,000.00</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Accounting	-		<b>\$135,500.00</b>									
Beginning POH	-		<b>\$135,500.00</b>									
Ending POH	-		<b>\$135,000.00</b>									
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<b>Reviewed by:</b> LV
<b>Reviewed on:</b> 11/13/2014
<b>Updates:</b>
<b>Recommendation:</b> Submitted
<b>File 2 – Phillips-Prosser</b>

<b>Age: 60 years</b>		<b>BRYAN JENSEN</b> was appointed conservator on 4/1/2009.  Court Investigator <b>JENNIFER DANIEL</b> filed a Petition for Transfer on 6/25/14 requesting this proceeding be transferred to Los Angeles County because the conservatee has resided there since 11/12/2010, and it is presumed pursuant to Probate Code §2215 that transfer of the conservatorship case to the county of residence is in the best interests of the conservatee.  Court Investigator further recommends that the fees and costs related to this transfer be waived.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 10/8/14. Minute order states no appearances. The Court directed that a copy of the minute order be sent to Jeff Shepard. – Minute order mailed on 10/10/14.</b>  <b>A Petition for Transfer of Proceedings to Santa Barbara County was filed by Bryan Jensen and is on page 3B.</b>  <b>Note:</b> If the petition is granted a status hearing will be set on <b>Wednesday, December 17, 2014</b> for the confirmation of receipt of transfer.
<b>Cont. from 072914, 090314, 100814</b>			
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<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	<b>Objections to Transfer of Proceedings filed on 9/2/14.</b> Bryan Jensen objects to the transfer of the proceedings to Los Angeles County. Mr. Jensen states he lives and works in Santa Barbara. He is required to file accountings every two years. Transfer of the proceedings to Santa Barbara County would have no detrimental effect on the conservatee.	
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			<b>Reviewed by:</b> KT
			<b>Reviewed on:</b> 11/13/14
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 3A – Jensen</b>

**3A**

Petition for Transfer of Proceedings to Santa Barbara County, California and  
Objection to Transfer of Proceedings to Los Angeles County

Age: 60 years		<b>BRYAN JENSEN</b> , conservator of the person and estate, is petitioner.  <b>BRYAN JENSEN</b> was appointed conservator on 4/1/2009.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 10/8/14. Minute order states no appearances. The Court directed that a copy of the minute order be sent to Jeff Shepard. – Minute order mailed on 10/10/14.</b>  1. Need Notice of Hearing.  2. Need proof of service of the Notice of Hearing on: a. Debra Jensen (conservatee) b. Darren Jensen (son) c. Bertha Sherbon (mother) d. Linda L. Silveira (sister) e. Virginia Hanson (sister)  3. Need Order.  <b>Note:</b> If Petition is granted petitioner will need to pay the transfer fee of \$50.00 to Fresno Superior Court and also provide a check for \$435.00 payable to Santa Barbara Superior Court or a fee waiver for their filing fee. Probate Code 2216(b).  <b>Note:</b> If the petition is granted a status hearing will be set on <b>Wednesday, December 17, 2014</b> for the confirmation of receipt of transfer.
Cont. from 100814		Petitioner states the Conservatee, a widow, resides in Clearview Alzheimer's Care Facility located in Los Angeles County.	
	Aff.Sub.Wit.		
✓	Verified	The Conservator resides in Santa Barbara County.	
	Inventory		
	PTC	Court Investigator, Jennifer Daniel, petitioned the court to transfer the proceedings to Los Angeles County.	
	Not.Cred.		
	Notice of Hrg	X	Petitioner is petitioning to transfer the proceedings to Santa Barbara County for the following reasons:
	Aff.Mail	X	
	Aff.Pub.		a. The conservatee has dementia and other related problems which means she is unaware of where she resides and has no knowledge of the court jurisdiction of her conservatorship.
	Sp.Ntc.		
	Pers.Serv.		b. The conservator is employed as a Sargent for the Santa Barbara Police Department. Conservator is the person responsible for all conservatorship matters and for any necessary court appearances. In the event a court appearance in Los Angeles became necessary, there would be additional costs to the conservatorship in that the conservator would be required to take extra time off work.
	Conf. Screen		
	Letters		c. Transfer of the conservatorship to Santa Barbara County would have no detrimental effect on the conservatee.
	Duties/Supp		
	Objections		<b>Wherefore, Petitioner prays</b> that the petition for transfer of the conservatorship to Los Angeles County be denied and this conservatorship be transferred to the Superior Court of Santa Barbara.
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
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	UCCJEA		
	Citation		
	FTB Notice		

**Report of Administrator and Petition for Final Distribution Upon Waiver of Accounting of the Estate of Sharon Rutherford, and Petition for Allowance of Statutory, Extraordinary Compensation and Reimbursement for Out-of-Pocket Expenses and Mileage for Co-Administrators, Statutory and Extraordinary Fees for Attorney [Prob. C. 10951(a)(1), (b)(7)]**

<b>DOD: 10-11-11</b>		<b>ROBERT JONES and DENISE JONES</b> , Co-Administrators with Full IAEA without bond, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Cont. from 8-13-14, 10-15-14.</b>  <b>Need amended petition.</b>  <b>As of 11-13-14, nothing further has been filed.</b>  <b>See additional pages for issues.</b>  <u><b>SEE ADDITIONAL PAGES</b></u>
		Petitioners are the sole heirs and waive accounting.	
<b>Cont. from 081314, 101514</b>		I&A: Petitioners state an I&A will be filed prior to the hearing reflecting that there were no assets marshaled in the estate. All assets were received after the date of death. Sharon and James Rutherford were both tragically killed in an automobile accident on 10-11-11.	
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		POH: \$58,956.64 (cash)	
		Co-Administrators (Statutory): Petitioners request statutory commissions of \$2,358.26 based on a fee base of \$58,956.64.	
		Co-Administrators (Reimburse): \$1,721.24 including \$1,335.00 for filing objections in related estate 12CEPR00016, regarding appointment of a personal representative in the case and to the establishment of the ownership of the family home, \$335.24 for vet bills for the decedent's cat and \$51.00 for securing the decedent's residence after her death (changing the locks).	
		Co-Administrators (Extraordinary): \$1,150.00 (See Exhibit "A")	
		Co-Administrators (Mileage): \$2,055.20 for 3,670 miles @ \$.56/mile because Petitioners reside in Sacramento.)	
		Attorney (Statutory): \$2,358.26	
		Attorney (Extraordinary): \$3,416.00 (declaration to be filed separately)	
		Petitioners state after payment of fees and expenses as prayed, the amount remaining is \$45,462.68 to be paid to John Albert Edie, Jeffrey Nass, and Tomassian, Pimentel & Shapazian for full consideration pursuant to the settlement agreement for Civil Case 12CECG03015. See receipt filed 7-9-14.	
<b>Reviewed by: skc</b>			
<b>Reviewed on: 11-13-14</b>			
<b>Updates:</b>			
<b>Recommendation:</b>			
<b>File 5 – Rutherford</b>			

## Page 2 – NEEDS/PROBLEMS/COMMENTS:

Need amended petition based on the following:

1. Need I&A per Probate Code §8800. **Note:** Petitioner states the I&A, when filed, will reflect that no assets were marshaled; however, pursuant to the Settlement Agreement entered into between this estate and the Estate of James Rutherford and approved by the Court on 3-12-13 in 12CEPR00016, certain assets were deemed assets of this estate. Therefore, a no-asset inventory does not appear to be correct. The settlement agreement provided in relevant part that:
  - Each estate was to retain any and all life insurance proceeds payable to the respective decedent (Were there life insurance proceeds to inventory?)
  - Proceeds from the sale of the residence was deemed an asset of James' estate
  - Proceeds from the estate sale were to be divided between the two estates
  - Sharon's estate was to retain the insurance payoff for the vehicle involved in the collision, provided there was documentation establishing that she was the sole owner, or if they were both on title, proceeds to be split. (Was the vehicle Sharon's asset?)
  - Sharon's estate was to be responsible for payment of the creditor's claim filed by Ronald D. Jones in both estates, and in 12CESC01458
  - James' estate waived claim to two accounts at Union Bank (So were these accounts then assets of Sharon's estate?)

Therefore, pursuant to this agreement, it appears the I&A, when filed, should reflect the assets that were determined to belong to Sharon's estate.

**Note:** It appears that pursuant to this settlement agreement, Sharon's estate accepted \$46,505.42 from James' estate. Need clarification: Did this sum paid from James' estate represent some or all of the value of the assets mentioned above?

2. As noted above, pursuant to the Settlement Agreement, Sharon's Estate was to be responsible for payment of the creditor's claim filed by Ronald D. Jones in this estate on 7-10-12 and litigated in 12CESC01458 (later consolidated with James' estate 12CEPR00016). However, this petition does not address this claim at all other than to note that the claim was filed. Was this claim paid?

Need Allowance or Rejection of Creditor's Claim, and Notice of Hearing of this petition to the creditor if the claim remains unpaid per §11000, or receipt or withdrawal of the claim.

**Note:** Although the small claims case opened by the creditor was consolidated with James' estate, when James' estate was closed, the personal representative referred to the settlement agreement and noted that Sharon's estate was responsible for this claim.

3. Need detailed schedule of receipts and gains or losses with regard to the fee base of \$58,956.64 pursuant to Cal. Rules of Court 7.550(b)(6).
4. Need detailed schedule of costs of administration totaling \$1,721.24. Cal. Rules of Court 7.550(b)(7). (Exhibit "A" only states that the co-administrators each spent \$667.50 out of pocket, plus the vet and the locks, but there is no itemization of the \$1,335.00.)

SEE ADDITIONAL PAGES

## Page 3 – NEEDS/PROBLEMS/COMMENTS (Cont'd):

5. Petitioners state they spent \$335.24 on vet bills in connection with the decedent's cat, but do not provide itemization, and do not state why it was necessary. However, also, the Creditor's Claim filed by Ronald Dean indicated that he also spent a total of \$563.02 in vet and other expenses in connection with the cat.

The Court may require clarification as to why it was necessary for numerous parties to spend almost \$900 on this cat. Where is the cat? Or was it more than one? If the cat was taken in by someone, why are these expenses of administration rather than new pet-owner expenses? (Please note: Examiner understands rehoming expenses associated with decedents' pets (shots, supplies); however, the amounts noted here in total appear excessive.)

6. The Creditor's Claim filed by Ronald Dean also includes \$8,258.84 in funeral expenses, with itemization. Petitioners are requesting payment for their time spent on funeral arrangements. Need clarification.
7. Need separate itemization of extraordinary compensation requested. Cal. Rules of Court 7.703. The request should include sufficient detail to determine if the time spent was extraordinary in nature and which co-administrator performed which task.

Note: The itemization should include clarification regarding the request for compensation for time spent by Petitioners in consultation with their attorney Nancy LeVan, as well as 2 hours to "visit local attorney Polly (original attorney)."

Note: The itemization should include more specific detail regarding the numerous dates and time listed under "emailed/US Mail correspondence to attorney Dates, scanning documents (various docs, draft trust...), certified mail."

Note: There are line items for opening a bank account and making various deposits; however, opening and managing an estate bank account is associated with general estate administration (statutory) rather than extraordinary administration. Therefore, need clarification on revised itemization.

Note: Exhibit "A" is very confusing. The petition refers to Exhibit "A" for itemization regarding the request for extraordinary compensation; however, the total of Exhibit "A" is \$1,721.24, which is the figure requested for reimbursement of expenses of administration only. However, it appears to include list only time spent, totaling that amount. actual time and expenses.

8. Need attorney's declaration re request for extraordinary compensation. Cal. Rules of Court 7.703.

SEE ADDITIONAL PAGES



## Page 4 – NEEDS/PROBLEMS/COMMENTS (Cont'd):

9. Petitioners state that John Albert Edie and Jeffrey Nass filed Civil Case 12CECG03015 against the Estate of James Rutherford 12CEPR00016, which included the Estate of Sharon Rutherford. That settlement included the following terms:

- Farmers Insurance to pay plaintiffs \$100,000.00
- Estate of Sharon Rutherford – all remaining proceeds represented to be over \$44,000.00
- Estate of James Rutherford - \$25,000.00

Receipt filed 7-9-14 indicates that \$45,462.68 was paid to John Albert Edie, Jeffrey Nass, and Tomassian, Pimentel & Shapazian from the estate pursuant to the terms of the settlement agreement. However, there are a couple of issues that require clarification:

a. Petitioners state POH is \$58,956.64. Does that include the amount paid pursuant to the settlement agreement? If so, but the \$45,462.68 has already been paid per the receipt, then the POH would actually be \$13,493.96. Need clarification.

b. The receipt is signed by Mr. Pimentel's assistant. The Court may require a receipt signed by the intended recipients or the attorney himself.

c. Similar to the question regarding calculation of the fee base, it is unclear how this figure was calculated. If the POH is \$58,956.64, and all fees and costs are awarded as prayed, that would leave \$45,897.68 for distribution. Need clarification re the discrepancy.

<b>DOD: 4-4-13</b>	<b>BETTY A. PATE</b> , Daughter, was appointed as Executor with Full IAEA without bond on 7-24-13 and Letters issued on 8-2-13.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 9-19-14.</b> <b>As of 11-13-14, nothing further has been filed.</b>  <b>1. Need first account or petition for final distribution or verified written status report pursuant to local rule.</b>
<b>Cont. from 091914</b>	At the hearing on 7-24-13, the Court set this status hearing for the filing of the first account or petition for final distribution.	
<b>Aff.Sub.Wit.</b>	Inventory and Appraisal filed 4-24-14 indicates a total estate value of \$644,428.38 consisting of real property, an Installment Note secured by deed of trust with assignment of rents, and a vehicle.	<b>Reviewed by:</b> skc <b>Reviewed on:</b> 11-13-14 <b>Updates:</b> <b>Recommendation:</b> <b>File 7 - Guidi</b>
<b>Verified</b>	The first account or petition for final distribution is now due. Probate Code § 12200.	
<b>Inventory</b>	<b>Status Report filed 9-16-14 (not verified)</b> states the only real property of the estate has been sold and the only impediment to closing the estate is settlement with the California Franchise Tax Board. The Executrix has taken the position that no taxes are due to the State from the sale and is discussing said issue with the Board. Upon resolution, the estate should be in a position to close.	
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<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

(1) First and Final Report of Executor on Waiver of Account; (2) for Allowance of Compensation to Attorneys for Ordinary Services; (3) and Petition for Final Distribution

<b>DOD: 03/28/12</b>		<b>PHYLLIS NETHERTON</b> , Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Petitioner proposes to distribute the assets of the estate directly to herself, however, decedent's will directs distribution of estate assets to the Trustee of The Centrone Family Trust. The Court may require authority supporting Petitioner's request to bypass distribution to the Trust.  2. Need Order.
<b>Cont. from</b>			
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	<b>Letters</b>	03/13/14	
	<b>Duties/Supp</b>		
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	<b>UCCJEA</b>		
	<b>Citation</b>		
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<b>Accounting is waived.</b>  I & A - <b>\$193,091.00</b> POH - <b>\$193,091.00</b>  Executor - <b>waived</b>  Attorney - <b>\$6,792.72</b> (statutory) (to be paid by Petitioner outside of the estate)  Costs - <b>\$1,265.50</b> (filing fees, publication, certified copies) (to be paid by Petitioner outside of the estate)  Petitioner states that the beneficiary of decedent's will is Phyllis Ann Netherton, Successor Trustee of The Centrone Family Trust dated July 10, 1991, and as amended. The Trust provides that any portion of the survivor's trust (assets owned by the decedent) shall be distributed to Phyllis Ann Netherton. In order to simplify the legal process in obtaining new stock certificates, Phyllis Ann Netherton elects to have the estate distributed to her directly.  <b>Petitioner requests distribution as follows:</b>  Phyllis Ann Netherton – 100% interest in various securities valued at \$193,091.00	<b>Reviewed by:</b> JF <b>Reviewed on:</b> 11/13/14 <b>Updates:</b> <b>Recommendation:</b> <b>File 8 - Centrone</b>
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**Petition Concerning Internal Affairs of Trust - Appointment of Successor Trustee**

		<b>PENNY AARONIAN</b> , wife of Randy Aaronian, a cousin of Richard Boghosian, who is one of the beneficiaries of the <b>RICHARD BOGHOSIAN TRUST</b> , is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 10/8/14. As of 11/12/14 the following issues remain:</b>  1. Order Shortening Time was signed on 10/2/14 allowing this petition to be heard on 10/8/14. The order does not waive notice of the hearing nor does it shorten time for notice. Therefore need Notice of Hearing with proof of service on Richard Boghosian, Bruce Bickel and Richard Garabedian.  2. It appears that Petitioner Penny Aaronian does not have standing to bring this petition. Probate Code §17200 states a trustee or a beneficiary of a trust may petition under this chapter concerning the internal affairs of the trust. Petitioner is not the trustee nor is she a beneficiary of the trust.  <b>Please see additional page</b>
<b>Cont. from 100814</b>		<b>Petitioner states</b> the trust was established by <b>Richard Baghosian</b> ("Richard") by a Declaration executed on 7/29/2004.	
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<input type="checkbox"/>	<b>Aff.Mail</b>	X	
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<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>BRUCE BICKEL</b> ("Bickel") is designated as the original trustee of the Trust.</p> <p>On 11/4/2005, a "First Amended and Complete Restatement of Declaration of Trust of Richard Boghosian" ("First Amended Trust Declaration") was prepared and executed by Richard as trustor and Bickel as trustee.</p> <p>On 11/29/2007, a "Second Amended and Complete Restatement of Declaration of Trust of Richard Boghosian" ("Second Amended Trust Declaration") was prepared and executed by Richard as trustor and Bickel as trustee.</p> <p>Article Ten, Paragraph A of the Trust Declaration provides that if Bickel fails to act as trustee, then <b>DALE GARABEDIAN</b> ("Garabedian") shall act as trustee.</p> <p>Article Ten, Paragraph A provides that any trustee may resign at any time.</p> <p>Due to a Dispute that has arisen between Richard and Bickel, Bickel provided notice on 9/11/14, of his resignation as trustee of the Trust, effective 10/15/14.</p> <p style="text-align: center;"><b>Please see additional page</b></p>	
<b>Please see additional page</b>			
<b>Reviewed by: KT</b> <b>Reviewed on: 11/13/14</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 10 - Boghosian</b>			

Due to some conflicts of interest that have arisen in the dispute between Richard and Bickel, Garabedian has declined to act as trustee.

**Randy M. Aaronian**, cousin to Richard, has offered to serve as successor trustee, however due to his appointment as Guardian Ad Litem for Richard in the dispute between Richard and Bickel, it was decided that this would result in a conflict of interest and Mr. Aaronian's wife, Petitioner herein, has offered to serve as successor trustee.

The Office of Successor Trustee will be vacant as of 10/15/14. Pursuant to the circumstances as provided in this petition, Petitioner seeks this Court's order appointing the Petitioner as Successor Trustee, without bond, with all the powers granted to Petitioner under the Trust Declaration to carry out the purpose of the Trust.

**Petitioner prays that:**

1. The Court finds that all notices required by law have been given;
2. The Court find that Bickel has resigned as trustee of the Trust;
3. The Court find that Garabedian has declined to serve as successor trustee;
4. The Court find that Petitioner, Penny Aaronian, is willing and able to perform the duties and responsibilities as successor trustee, and, accordingly, is appointed successor trustee of the RICHARD BOGHOSIAN TRUST, established July 29, 2004, without bond, and with all the powers under the Trust Declaration to carry out the purpose of the trust.

**NEEDS/PROBLEMS/COMMENTS (Continued):**

3. Probate Code § 15602 requires a bond for any individual not named in the trust instrument. The Court may not excuse the requirement of a bond except under compelling circumstances.
4. Petition does not include copies of the First Amended Trust Declaration or the Second Amended Trust Declaration.
5. The file contains a letter from Tracy S. Regli indicating that Bruce Bickel was providing notice of his intent to resign as trustee effective October 15, 2014. However an actual resignation signed by Bruce Bickel has not been provided to the Court.

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 07/13/14</b>		<b>ROBERT BOOKER</b> , step-son/named alternate Executor without bond, is Petitioner.  Full IAEA – OK  Will dated 02/24/10  Residence: Fresno Publication: The Business Journal  <b><u>Estimated Value of the Estate:</u></b> Personal property - \$ 21,000.00 Real property - 260,000.00 <b>Total - \$281,000.00</b>  Probate Referee: <b>RICK SMITH</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<b>Cont. from</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			s/p
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>			w/o
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
<b>Reviewed by:</b> JF				
<b>Reviewed on:</b> 11/13/14				
<b>Updates:</b>				
<b>Recommendation:</b> SUBMITTED				
<b>File 13 - Booker</b>				

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 08/21/13			<b>MILDRED THOMSEN</b> , spouse/named Executor without bond, is Petitioner.  Full IAEA – <b>NEED PUBLICATION</b>  Will dated 08/11/06  Residence: Kerman Publication: <b>NEED</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Affidavit of Publication.  2. Item 8 of the Petition indicates that the decedent has a deceased son, Thomas Thomsen, Jr. but does not state the date of death. Pursuant to Local Rule 7.1.1D - If a beneficiary, heir, child, spouse, or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition.
Cont. from				
	Aff.Sub.Wit.	s/p		
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg		<b>Estimated Value of the Estate:</b> Personal property - \$1,085,844.00 Annual income - 155,998.00 Real property - 360,000.00 <b>Total - \$1,601,842.00</b>	
✓	Aff.Mail	w/		
	Aff.Pub.	x		
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Probate Referee: <b>STEVEN DIEBERT</b>				
<div> <div>Reviewed by: JF</div> <div>Reviewed on: 11/13/14</div> <div>Updates:</div> <div>Recommendation:</div> <div>File 14 - Thomsen</div> </div>				

**Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for  
Failure to File a First Account or Petition for Final Distribution**

		<p><b>TAKAKO RENGE</b>, spouse, was appointed Administrator with full IAEA without bond on 10/10/2006.</p> <p>Letters issued on 10/10/2006.</p> <p>Inventory and Appraisal was due on 03/2007.</p> <p>First Account or Petition for Final Distribution was due 12/2007.</p> <p>Notice of Status Hearing was mailed to Lawson K. Renge on 11/22/2013.</p> <p><b>Former Status Report filed 10/30/2014</b> states the only asset subject to this proceeding is decedent's client trust account. Bank of America gave two options for distribution:</p> <ol style="list-style-type: none"> <li>Where the personal representative is an attorney, Letters Testamentary/Administration are required giving full authority to operate the account.</li> <li>Where the personal representative is not an attorney, the estate attorney must provide a statement accepting responsibility to ensure that the account is handled properly.</li> </ol> <p>Attorney Renge has decided to accept the responsibility for handling the account because the personal representative, Takako Renge, of the Estate is not an attorney. Accordingly, Attorney Renge shall complete the requirements of the Bank in obtaining money in the account. Once the bank agrees to the acceptance of the responsibility the Inventory and Appraisal shall be filed. Additional time is requested to secure Bank approval and to obtain an appraisal for filing with the Court.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 11/19/2014.</b></p> <ol style="list-style-type: none"> <li>Need Inventory and Appraisal and First Account or Petition for Final Distribution or <u>current written status report</u> pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</li> </ol>
<b>Cont. from 030714, 062014, 081914, 110314</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>		
<input type="checkbox"/>	<b>Aff.Mail</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 11/13/2014</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 15 – Renge</b></p>	



**(1) First and Final Report of Special Co-Administrators and Co-Administrators on Waiver of Account and (2) Petition for Allowance of Compensation to Co-Administrators and Attorney for Ordinary Services, (3) for Allowance of Compensation to Attorney for Extraordinary Services, and (4) for Final Distribution**

<b>DOD: 12-21-12</b>		<p><b>ROBERT SHAW, GAYDEN L. SCHORLING, and DOUGLAS D. SCHORLING</b>, First Cousins of the Decedent and Co-Administrators with Limited IAEA without bond, are Petitioners.</p> <p>Accounting is waived (?)</p> <p>I&amp;A: \$655,522.13          POH: \$515,024.24 plus a 1995 Pontiac Monte Carlo</p> <p>Co-Administrators (Statutory): \$16,110.44 (to be divided equally between two of the Co-Administrators Robert Shaw and Gayden L. Schorling)</p> <p>Attorney (Statutory): \$16,110.44          (Note: Co-Administrator Douglas D. Schorling is the attorney for the three Co-Administrators.)</p> <p>Attorney (Extraordinary): \$13,970.00          (Declaration filed 11-12-14 indicates 91.9 hours at \$150/hour for legal services including Petition to Determine Entitlement and Petition for Payment of Family Allowance, Unlawful Detainer, and Small Claims, and Court confirmed sale of real property totaling \$13,970.00)</p> <p>Closing: \$10,000.00 (for anticipated expenses including estate income taxes and Decedent's personal income taxes)</p> <p><b>Distribution pursuant to intestate succession:</b></p> <p>Bobbi A. Schorling, Cheryl Reuben, Gayden L. Schorling, Robert Shaw, and Douglas D. Schorling: An undivided 20% interest in the estate, or \$103,004.84 less compensation and closing expenses.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Continued from 11-12-14. The following issues remain noted:</p> <p><u>SEE ADDITIONAL PAGES</u></p>	
<b>Cont. from 111214</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
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<input checked="" type="checkbox"/>	<b>Inventory</b>			
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<input checked="" type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			
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<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>			12-26-12
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input checked="" type="checkbox"/>	<b>FTB Notice</b>			

**NEEDS/PROBLEMS/COMMENTS (Continued):**

1. **Petitioners request that the Co-Administrators' statutory compensation be split between two of the Co-Administrators, Robert Shaw and Gayden D. Schorling, and that Attorney Douglas D. Schorling, who is the third Co-Administrator, but is also the attorney for the Co-Administrators, receive the entire amount of statutory compensation as attorney. The Court may require clarification or authority for this request with reference to Cal. Rules of Court 7.706(a), which states:**

**(a) Personal representative's compensation only**

Notwithstanding the provisions of the decedent's will, a personal representative who is an attorney may receive the personal representative's compensation but may not receive compensation for legal services as the attorney for the personal representative unless the court approves the right to compensation for legal services in advance and finds the arrangement is to the advantage, benefit, and best interest of the decedent's estate.

**Note: It does not appear that Mr. Schorling has requested approval in advance for compensation as an attorney pursuant to the above Rule of Court. As such, it appears that his statutory compensation may be limited to a one-third share of the Co-Administrators' statutory compensation, instead of the two other Co-Administrators splitting it half each.**

2. **Petitioners request a closing reserve of \$10,000.00 due to anticipated potential additional taxes and expenses, and request to distribute the balance of the reserve without further Court order.**

However, consistent with the Court's recent practice, if Court determines an informal accounting of the closing reserve is warranted, Court will set a Status Hearing as follows:

**Wednesday, May 13, 2015 at 9:00 am in Dept. 303 for an Informal Accounting of the \$10,000.00 Closing Reserve.**

Pursuant to Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required. The filing of the Informal Accounting of Closing Reserve will not generate a new hearing date.

3. **The estate contains a 1995 Pontiac Monte Carlo that is considered to have no value as discussed at #17(i). If personal property is to be distributed in undivided interests, need written consent of all distributees pursuant to Local Rule 7.12.3. Alternatively, if the vehicle is to be distributed to one of the heirs, the Court may require consent of that heir.**

<b>DOD: 3-25-14</b>		<b>LANAE AREYANO</b> , Daughter, was appointed Administrator with Limited IAEA with bond of \$13,500.00 and deposits of \$1,663.00 to be placed into a blocked account on 10-7-14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Continued from 11-12-14.</u>  <b>Minute Order 11-12-14:</b> Bond was issued and filed. If receipts for the Blocked Account are filed by 11/17/14, then no appearance is necessary on 11/19/14.  <u>As of 11-13-14, nothing further has been filed.</u>  <b>1. Need Receipt and Acknowledgment of Order to Deposit Money Into Blocked Account.</b>  <b>Note:</b> The Order to Deposit Money Into Blocked Account appears to be based on the Declaration filed 10-6-14 that stated the decedent's checking and savings account balances totaled \$1,663.00. However, the Final I&A filed 11-4-14 does not include this amount.
<b>Cont. from 111214</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>		At the hearing on 10-7-14, the Court signed the Order for Probate and the Order to Deposit Money Into Blocked Account and set this status hearing for the filing of the bond and receipt for blocked account.  Bond was filed on 10-30-14 and Letters issued on 11-4-14.  Inventory and Appraisal filed 11-4-14 includes real property valued at \$145,000.00, a vehicle valued at \$9,500.00, and misc. furniture and personal effects valued at \$5,000.00, for a total of \$159,000.00.	
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>		<div>Reviewed by: skc</div> <div>Reviewed on: 11-13-14</div> <div>Updates:</div> <div>Recommendation:</div> <div>File 27 – Areyano</div>	
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Age: 1 month		<u>GENERAL HEARING 1/6/14</u>		NEEDS/PROBLEMS/COMMENTS:	
		WILLIE MAE JOHNSON, maternal aunt, is petitioner.		<p><b>Continued from 11/12/14. Minute order states</b> parties should obtain a minute order or court order from Dependency indicating that this Court may have jurisdiction before this matter can move forward.</p>	
Cont. from 110514, 111214		Father: <b>RICHARD CAMPBELL, SR.</b> – <i>consents and waives notice.</i>			
	Aff.Sub.Wit.	Mother: <b>JAHADRAH JOHNSON</b> – <i>consents and waives notice.</i>			
✓	Verified	Paternal grandfather: Narvel Boston			
	Inventory	Paternal grandmother: Selestine Campbell			
	PTC	Maternal grandfather: Lodie Caldwell			
	Not.Cred.	Maternal grandmother: Rosalind Caldwell			
	Notice of Hrg	N/A	<p><b>Petitioner states</b> she would like placement of the child as a safety plan in lieu of foster care until Jahadrah and Richard are found capable of caring for baby Richard.</p>		
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: KT	
				Reviewed on: 11/13/14	
				Updates:	
				Recommendation:	
				File 28 – Campbell	